



Competitiveness of the European ICT industry in emerging technologies

Brief overview of the “COMPLETE” project

Paul Desruelle – Institute for Prospective Technological Studies (IPTTS)

EU Science Journalists Association (EUSJA) visit
ICT in Europe: a socio-economic approach

Seville, 20-21 January 2011

- Objective:
 - Analyse potential impact of emerging technologies on competitiveness of the European ICT industry
- Support to DG ENTREPRISE and INDUSTRY
- 3-year project, ended in Sept. 2010
- Co-financed by JRC-IPTS and DG ENTREPRISE and INDUSTRY
- Executed by IPTS – relied on both internal & external expertise

➤ 7 reports on European competitiveness in:

- WEB 2.0
- Displays (oleds and e-paper)
- RFID
- Embedded software in automotive
- Robotics
- Video Games Software
- Semiconductor Intellectual Property Architectural Blocks (IP cores)

- More rapid cycles of innovation in ICT than other industries
- ICT industry strongly globalised
- Need to:
 - pay attention to emerging, potentially disruptive, close to market technologies
 - establish a diagnosis of future competitiveness of the European industry in promising ICT areas
 - identify needs for policy support at EU level

- Results concerning competitiveness of the EU ICT industry mostly positive
 - EU industry well positioned in RFID, Robotics, Videogames, Automotive, IP cores and displays
 - but missed opportunities in Web 2.0

- Emerging threats, weaknesses:
 - Asian industry (e.g., displays, IP cores, videogames, Robotics)
 - Technology shifts (e.g., switch to electrical vehicles)
 - Demand issues (e.g., RFID dependent on public markets)
 - EU ICT companies size, age, growth, financing, market access (e.g., Web 2.0, videogames)

- Little R&D on these technologies currently observed in Eastern EU countries, in spite of Enlargement opportunities
 - to be further investigated - workshop planned mid-2011

- Synthesis on ICT innovation currently on-going
 - to be presented in a conference in Bruxelles later this year



- Up-to-date information available on COMPLETE project web page:

<http://is.jrc.ec.europa.eu/pages/ISG/COMPLETE.html>

- Two examples:
 - Video games software industry
 - Embedded software in automotive